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SUBJECT: Beywatch: Can Tunisia Cut Its Way Into the Medical Tourism Market?

11. INTRODUCTION: This report is one of a series drafted by Post's entry level officers which have the "Beywatch" caption. We believe the perspectives offered in the following vignette will give the reader greater insight into Tunisia. END INTRODUCTION.

12. SUMMARY: From Budapest to Bangkok, Western "medical tourists" are swarming to private clinics and large hospitals to receive care for a fraction of the cost they would pay back home. Travel agencies woo clients with pictures of slim, perky waifs with perfect smiles enjoying tour packages that include post-op stays at luxurious hotels and the chance to visit cultural sites as soon as the anesthesia wears off. Tunisia is trying to find its footing in this relatively new sector of the global marketplace. Though Tunisia only attracted about 500 medical tourists last year, local physicians, hotels and tour groups are eager to capitalize on a solid medical infrastructure and proximity to Europe. END SUMMARY.

IF THE PRICE IS RIGHT. . .

13. When comparing costs, it is not difficult to understand why someone from a country like the United Kingdom or the United States might choose to travel abroad for medical care. In the United States a patient can expect to pay around US \$8000 for a facelift, but s/he saves almost 70 percent on the same procedure in India or Thailand. Tunisian physicians can match the savings of these major players on the international plastic surgery scene: a facelift in Tunisia usually runs around 5600 TND (US \$4251).

"SEDUCING CLASSY CUSTOMER CATEGORIES"

14. Tunisian doctors and clinics are starting to form partnerships with hotels and airlines to offer patients discounted rates for all-inclusive deals. Dr. Samy Dlimi, a plastic surgeon with a private office in Tunis, however, noted one problem: "We don't have the hotels other countries do," he admitted. He is worried he will never be able to cater to a more upscale clientele until the Tunisian general tourism sector gets a bit of a facelift itself. While Tunisia's tourism industry made the country 2.56 billion TND (US \$1.98 billion) last year, foreigners often note that "five stars" here do not equal five stars in much of the rest of the world. The GOT has identified the lack of high-end tourist facilities as a challenge, and the Ministry of Tourism website insists that "Due importance is given to the quality improvement of Tunisian products, which are climbing to the top end of the range and are increasingly seducing classy customer categories. [sic]"

15. For now, Tunisian plastic surgeons cater primarily to middle-to-low income Europeans. Dr. Dlimi explained that he gets a large number of Dutch housewives, French students and Italian retail workers. "It's not the jet set," he sighed. Dr. Sami Kamoun, the director of the private Clinique Avicenne in Tunis, agrees and told Conoff that if medical tourism is going to work here it will have to

be based more on cutthroat pricing than on the extra luxuries offered to patients flying to places like Phuket or Rio.

¶16. Last year, about half a million Americans traveled overseas to receive some sort of medical care. Dr. Dlimi hopes to increase their numbers in Tunisia. "My dream is to build a bridge between Tunisia and the United States," he confided dramatically to Conoff. But Dr. Mohamed Smida, head of the well known Polyclinique El Menzah, scoffs at the idea of trying to attract Americans, pointing out that not very many Tunisians speak English and that Americans can find better travel deals than flights to Tunis. (COMMENT: The language barrier hasn't stopped British tourists from coming to Tunisia for health care, according to doctors and clinics, although the British Vice Consul had no knowledge of their presence. END COMMENT.)

QUALITY CONTROL

¶17. "Label Esthetique," a large Tunisian agency offering packaged medical tours, brags in its advertising that its doctors have all received diplomas from France, and the Clinique el Menzah, a large center for plastic surgery in downtown Tunis, details its physicians' work experiences at hospitals in Milwaukee and St. Louis. Doctors admitted to Conoff that although Tunisia's medical education system has solid infrastructure Western clients simply feel more comfortable working with experts trained in the very countries in which they cannot afford healthcare.

¶18. But while Tunisia may boast of a highly skilled set of medical professionals with international accreditations, there seems to be a lack of regulations in the aesthetic surgery field. Dr. Dlimi estimated that only half of all plastic surgeons practicing in the country are government qualified in that field. Dlimi shook his head

sadly when describing dermatologists performing eyelid surgery, trauma surgeons doing nose jobs, and general practitioners trying their hand at liposuction. As plastic surgery is not a formal specialty in the Tunisian medical education system, doctors wishing to perform the procedures must either study abroad, or do so without technical training or GOT sanction.

¶19. Dr. Kamoun has recently gone into partnership with two French travel agents who want to set up an office in Tunis to handle the logistics of bringing European clients to his clinic, but despite his hopes to expand his client pool, he worries that if medical tourism in Tunisia grows too rapidly, it could lead to shoddy care, which in turn could result in the bottom dropping out of the market. "If doctors aren't careful," Dr. Kamoun noted, "they will destroy Tunisia's reputation by pushing commercialism over medicine." On the other hand, many Tunisian medical students go abroad and stay abroad to practice, because there are more of them than there are patients. Kamoun noted that medical tourism, and the new clinics and offices it would bring, could provide a reason for Tunisian doctors to stay in Tunisia.

LATE IN THE GAME, CAN TUNISIA STILL PLAY?

¶10. Since tourism accounts for 7 percent of the Tunisian GDP, and 1 in every 6 jobs in the country is somehow related to travel and tourism, it is not surprising that GOT representatives have been pushing the country's hope of increasing its stake in the medical tourism economy. Tunisia has already gotten its feet wet in many ways; it has been treating Libyan patients for years, even during the embargo. But Tunisia is about a decade behind its competitors, and will probably have to work all that much harder to make itself a household name for worldwide patient care.

¶11. There are also some marketing hurdles that Tunisia may be facing as it competes in the global medical tourism marketplace. Tunisia, like France, has laws forbidding doctors from advertising, which is why you will only find their initials (Dr. F, Dr. P, etc.) on websites. This may be acceptable for larger clinics posting the resumes of a long list of physicians, but for individual doctors trying to get their name out to potential clients, this represents

an impediment. Also, perhaps due to the low 8 percent internet penetration rate here, the websites of Tunisian clinics and tour agencies tend to be a little less attractive or technically sound than those of their competitors. In a commercial arena driven by the World Wide Web, tech savvy may be as important as surgical skill, and Tunisia has some catching up to do.

COMMENT

¶12. There are many obstacles to Tunisia becoming a formidable competitor for medical tourists. The doubts about the quality of hotels and the tourism industry in general, language barriers, and concern about sustaining professional medical standards, all call into question whether Tunisia could be successful in such an effort.

It is doubtful that large numbers of American patients will ever travel the distance to a country most of them have probably never heard of for medical care, since they do not come in large numbers for general tourism, and Westerners' apparent preference for European-trained doctors may not bode well for the sustainability of the sector. While some doctors and the Ministry of Tourism would prefer to attract high-end travelers, a renovation of the tourism sector aimed at charming the wealthy might make it difficult to maintain, much less expand, the Tunisian client base of travelers seeking affordable package deals and, in some cases, doctors. But if the government begins to better regulate the practice of aesthetic medicine, and investors refrain from a sudden glut of discounted clinics, there may be hope that medical tourism may continue to grow here, particularly in terms of market share among middle income patients from Europe.

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